User Guide
Team Member

ITM Platform | Global Teamwork Solutions

TABLE OF CONTENTS

1. My Profile, Tutorials and Contextual Help

My Profile

When registering on ITM Platform, you will receive an email containing a URL address and your log-in details ①.
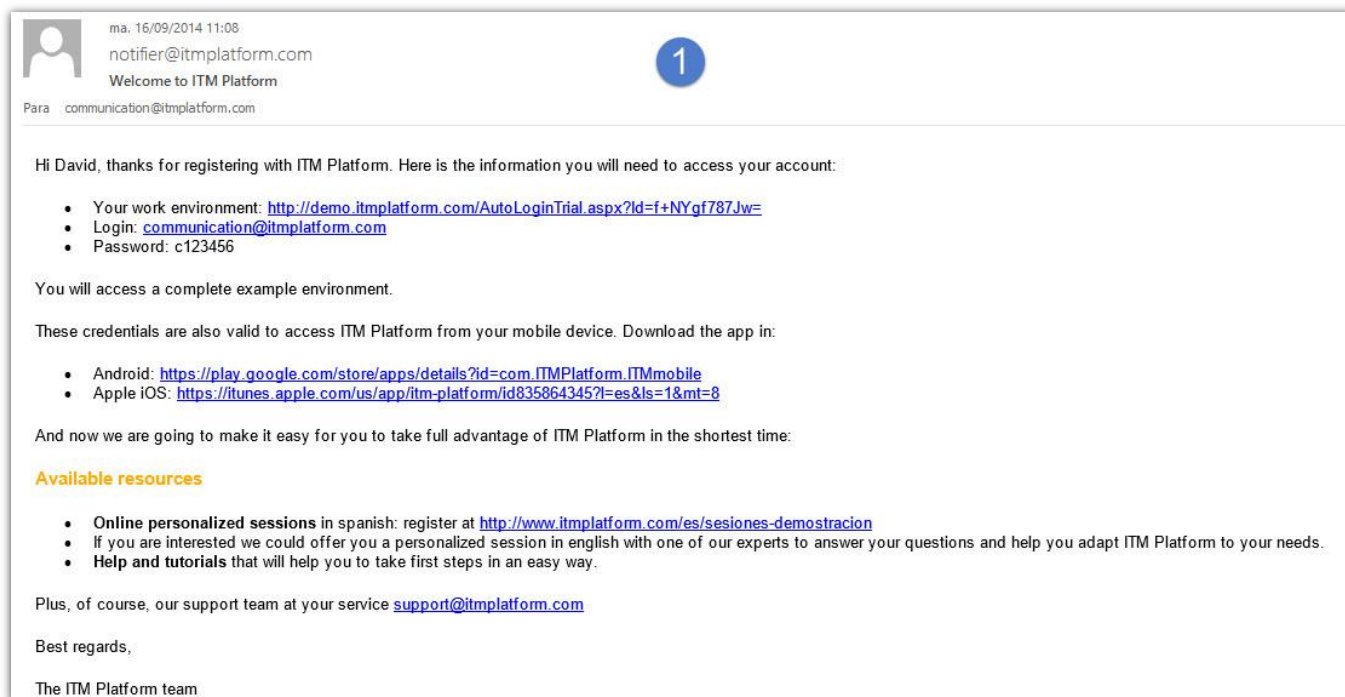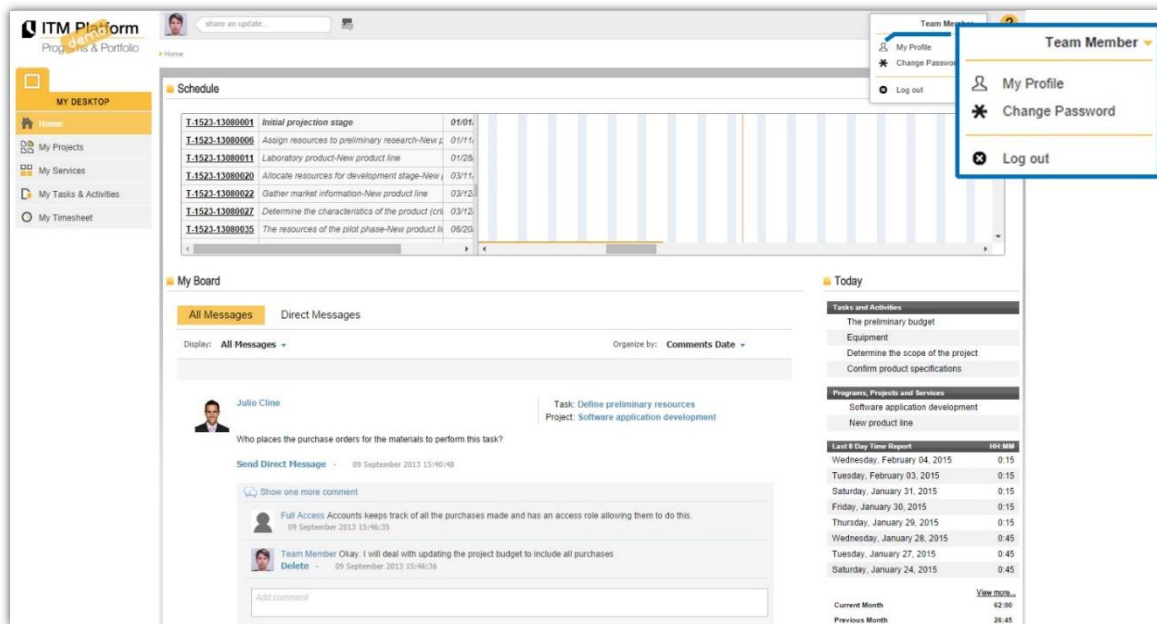

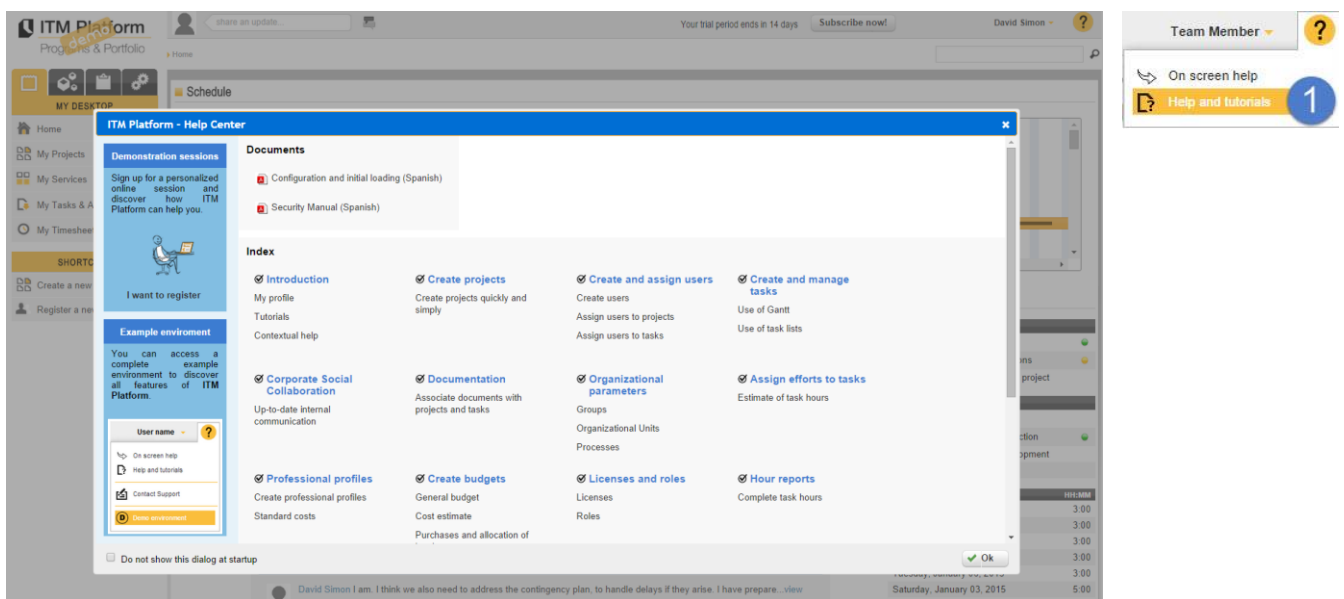Access the ITM Platform environment and enter your log-in username and password ②.

Your username will be the email address you used when registering, the one to which system notifications will be sent.
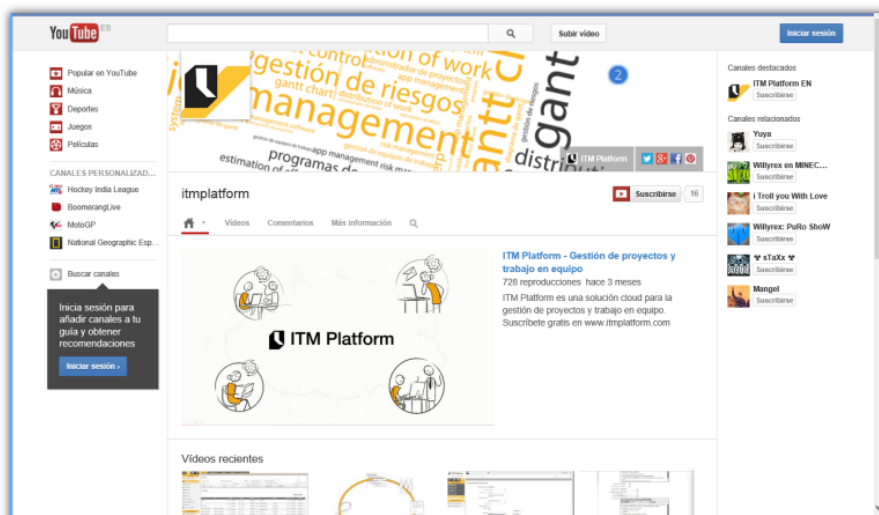
Your profile data and password can be changed ③:

Tutorials

Consult the video tutorials and guides by accessing the **Tutorials** option ① via the Help button

or via the ITM Platform YouTube channel at http://www.youtube.com/user/itmplatform ②.

Please consult the Help section or view the Tutorials on ITM Platform via the contextual Help button   4

2. Home

The Home page will provide access to all the features you need and will display important information about your work. The main elements are shown below:

1. **Menu**: Access all the other options from here.

2. **Talkbox**: Use this to post a comment that you wish to share from any ITM Platform screen.

3. **Search**: Find anything you need by typing in this text box.

4. **Tasks**: View the tasks assigned to you instantly and at a glance. The vertical stripe is today.

5. **Today Panel**: A list of tasks and projects that are active today. The 👤 icon means you are the Task Manager.

6. **Communication Panel**: All your communications - both public and private - classified by element.

3. My Tasks and Activities

The "My Tasks and Activities" section ① (or just "My Tasks" for *Projects & Teamwork*) is an information hub on the assignments received by the Project Manager.

All tasks will be shown by default, but the list can be filtered to only show those of most interest to you at any given time. In this example, we have opened the filter section ② and selected those tasks that end before a certain date and currently have a status of "Ongoing" ③, which produces a list with the tasks that meet these conditions ④.

This list can also be customised into columns, with the field to be shown in each column ⑥ selected from the drop-down list ⑤.

4. In a Project

When clicking on a project, you will find a series of tabs such as this:

- - **Home**: providing summary information on the project and access to the Communication Panel for the project.
- - **General**: More details about the project, its dates and relationships with your organisation.
- - **Team**: Information on the participants - Project Manager, the team and interested parties.
- - **My Tasks**: tasks that have been allocated to you.
- - **Documents**: Files or links of relevance to the project.

By clicking on a task, you will be shown a series of tabs similar to those shown when opening a project:
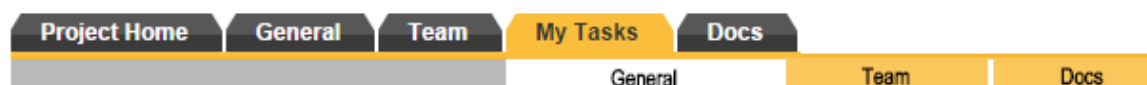
- - **General:** Details of the task.
- - **Team:** The people involved in the task.
- - **Documents**: Files or links of relevance to the task.

If you are the **Task Manager** (this is indicated by the ![icon] icon on the lists and by your appearance as such under the "Team" section), you will not only be able to view the information but you will be able to edit details and gain access to an additional section entitled "Supervision".
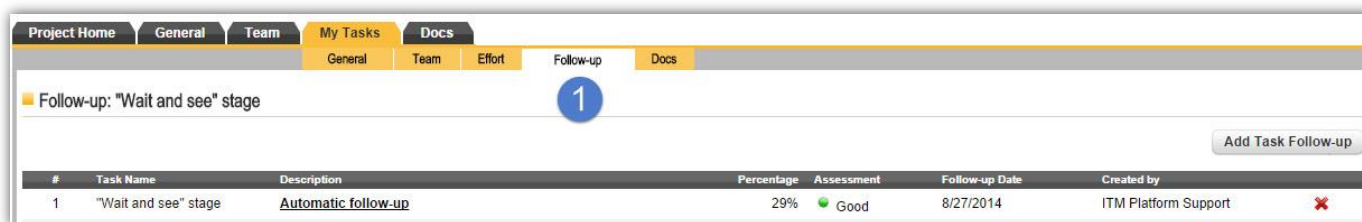
If this is the case, it is important that you fill in the supervision fields with the necessary information as often as instructed by your organisation because this information is needed for advancing the project and the programmes and the portfolio.
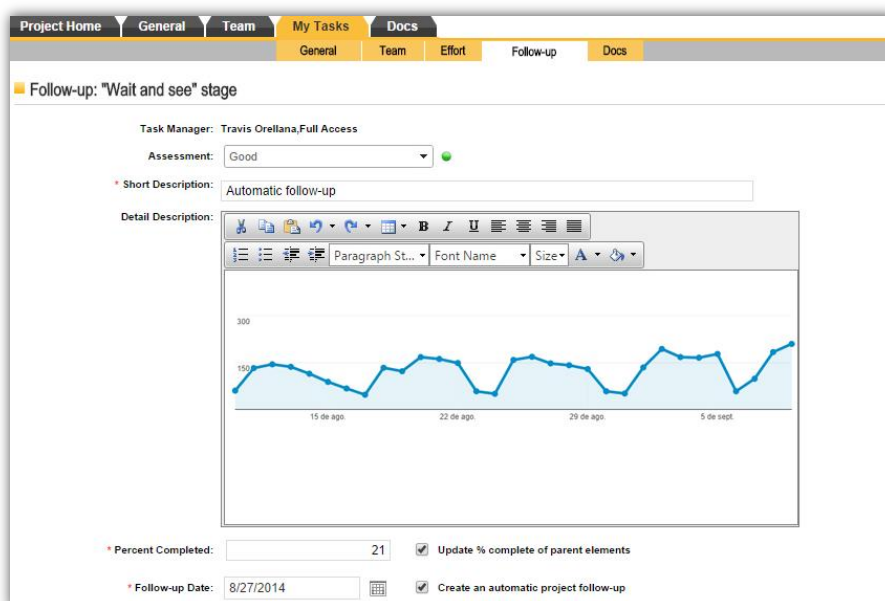
5. Time Sheet

Each member of a team can fill in the number of hours dedicated to their assigned tasks in one of two ways: weekly or for a range of dates.

Click on "Time Sheet" ① from "MY DESKTOP" and indicate the time used in the box corresponding to each day of the week ② :

Or allocate hours to daily tasks for a range of dates from the "My Tasks and Activities" section ③ by clicking on the "Time Sheet" icon ④ , selecting the dates and indicating the hours dedicated to the task.

You can also use the ITM Platform Mobile on your mobile device to fill in the time sheets.

6. Social Communication System

ITM Platform has a corporate social communication system that is similar to the well-known social networks but with the difference that these conversations are classified by topic (project, task, etc.) and only those with access to the items being discussed will have access to the corresponding conversations.

To start a conversation about a certain item, simply type something into the *talkbox* ❶ and the system will automatically classify your comment according to the corresponding item.

In this example, the comment relates to the "Add Roof" task for the "New Warehouse Construction" project. Once checked, the message will be visible to all those users with access to said task. From then on, any of them can reply and enrich the conversation.
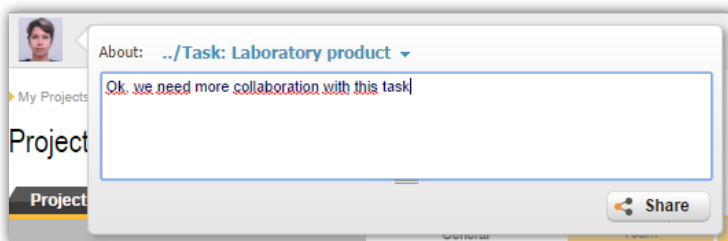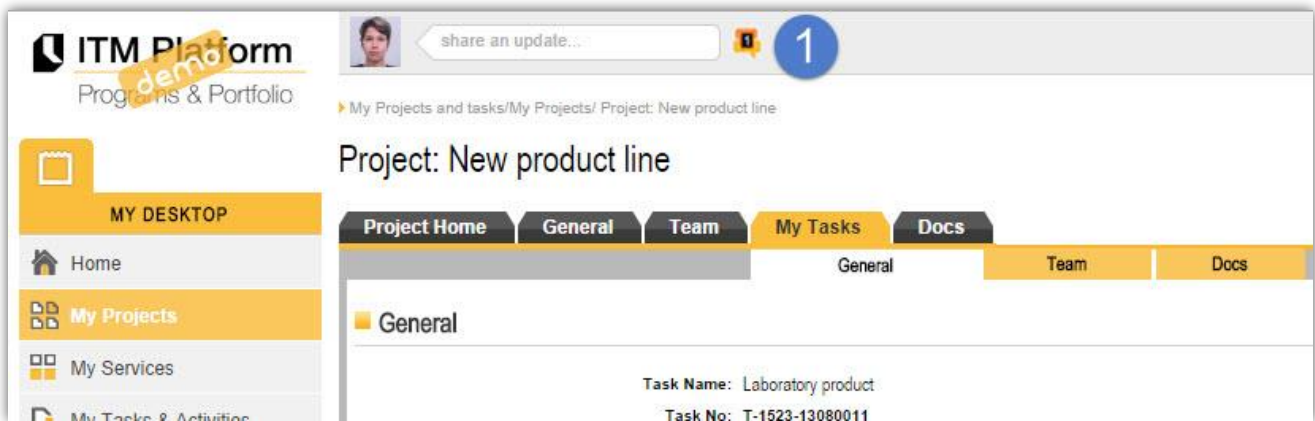
You will be able to make the following types of comment:

- General comments for the whole system
- Specific comments on a certain project (only visible to the members of the team on that project)
- Specific comments on a certain element of the project, such as "Risks" or "Budget"
- Specific comments on a certain task (only visible to those involved in the task and the Project Manager)
- One-to-one comments, as is the case with any IM system

By default, you will also receive an email with the content of the comment in the messages you have posted, as well as all those in which you have participated.
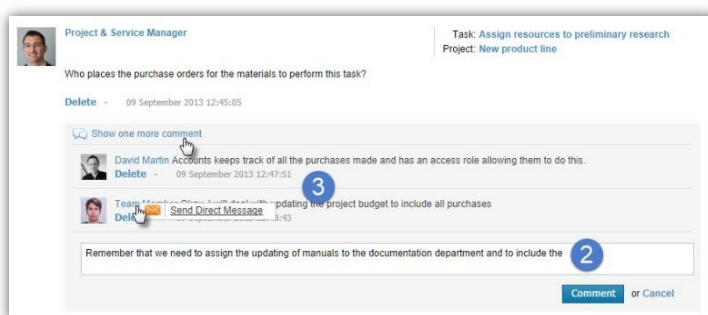
On the "Home" page, you will find all the messages to which you have access. These can be filtered, searched and replied to ❷, or you can send direct messages ❸ that will only be visible to the recipient. Your panel will also show all the automatic system-generated messages, such as those relating to task or project assignments.

7. Mobile App

Any user of ITM Platform can install the mobile app and gain access to their environment, projects, time sheets and Communication Panel.
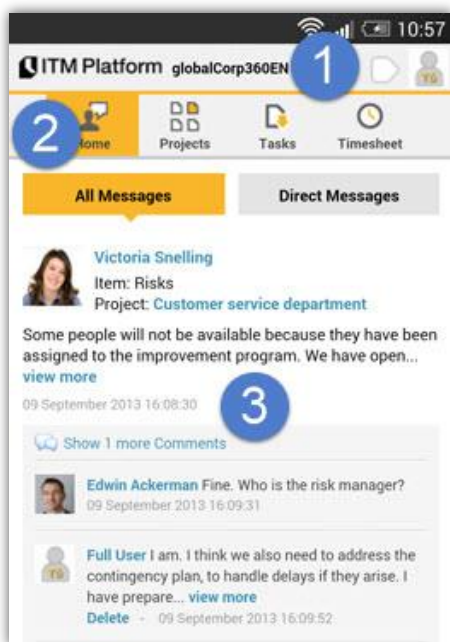
To do so, search for "ITM Platform" in the app store of your mobile system and install the app.

Once installed, you will be asked to enter your username and password. If you are registered at more than one organisation, you will be able to select the relevant one each time you log in. You will also be able to switch servers if you use one other than app.itmplatform.com.

When launching the app, the upper section ① will display the *talkbox* for starting conversations and accessing your profile by clicking on the photo.

The main menu ② will provide you with access to the Home page (in the image), the projects and tasks assigned to you and the time sheet, from where you can consult and create new entries.

The main section of the "Home" page displays the communication system ③, which operates in a similar way to the web application - allowing you to create, read and comment on public and private messages.

Time Sheet

From your mobile device, you will be able to report the hours dedicated to each task and even use a *start/stop* counter ④, which can be started when you start the task and stopped when you finish the task.

Various other items of information are also available that will help you better position the projects and tasks to which you are assigned, such as the project team ⑤ or the general information section.

ITM Platform | Global Teamwork Solutions

info@itmplatform.com – www.itmplatform.com